

# ORCA LIFT Enrollment Process

# ORCA LIFT

1. Verify client identity
2. Verify client eligibility for ORCA LIFT
3. Enter information into ORCA LIFT Registry
4. Provide client an ORCA LIFT card

Upon receiving their card, client can use their ORCA LIFT card to ride right away

# ORCA LIFT enrollment scenarios

# ORCA LIFT scenarios

There's two scenarios where clients can enroll in the ORCA LIFT. While they're mostly very similar, the specifics vary in each case. The upcoming slides will walk step-by-step through each of the following scenarios:

1. Enrolling a new ORCA LIFT client
2. Renewing an existing ORCA LIFT client

# 1. Enrolling a new ORCA LIFT client

# Search for client

1. Enter the client's first and last name
2. Enter the client's date of birth
3. Click **Search LIFT Registry**

## Existing LIFT Card Holder Search

All searches will include results that "sound like" the word you are searching for, but may have a different spelling. Add an \* asterisk before the name to indicate any unknown letters.

\*Full or Partial First Name :  Required. Minimum 2 letters

\*Full or Partial Last Name :  Required. Minimum 2 letters

The below fields must match an existing record in order to be included in the results page. No partial matches will be returned.

Date of Birth (DOB) :  /  /  [clear selection](#)  
(if DOB is supplied, you may leave First Name blank)

5 digit Zipcode :  Optional but Requires First and Last Name if used.

Card Serial Number :  Optional. Overrides all other search filters. Exact match only.

Low Income Fare ID :  Optional. Overrides all other search filters. Exact match only.

**Search LIFT Registry**

# Create new cardholder registration

1. If the client you're looking for isn't in the LIFT registry, click New Card Holder Registration

## Existing LIFT Card Holder Search

LIFT Card Holders are not permitted to have a second card. Lost or stolen cards must be reported to Customer Communications & Services.

We found **4** matches.

Card Holder Name	Address	Date Of Birth	Date Issued	CSN	LIFT ID
Konecny Mark	--Using Agency Address--	04/02/1957			16767
Mark Konecny	Homeless seattle, WA 98104	03/02/1957	01/23/2020	13491053	1929
Mark Konecny	Homeless seattle, WA 98104	03/02/1957	06/05/2020	13829594	1929
mark Konecny	201 S JACKSON ST SEATTLE, WA 98104	04/02/1957	09/03/2019	14150232	19649

[Edit Search Criteria](#)[New Card Holder Registration](#)

Only select "New Card Holder Registration" if the client you searched for doesn't show up

# Cardholder name

1. Enter this information

## Register New LIFT Card Holder

Fields marked with \* are Required

### New Card Holders Name

\*Recipient's First Name :

\*Recipient's Last Name :

Recipient's Middle Initial :  (optional)

\*Date of Birth (DOB) :  /  /   [clear selection](#)

Potential Duplicates : 28



# Documentation and demographics

## 1. Enter this information

### Documentation Check

*Note: If you require a different Qualifying Document type not listed below, please contact the Customer Communications & Services at (206) 477-4553 to add it.*

\*Qualifying Document : <Select a Document Type> ▼

\*Personal Identification Type : <Select a Identification Type> ▼

\*Race : --Select a Race-- ▼

\*Primary Language : --Select a Language-- ▼

\*Household Size :

Notes :

# County of residence vs mailing address

- County of residence

The county of residence will usually match mailing address, but not always

- Mailing address

We want to make sure mailing address is correct in case we need to mail out cards or additional information.

If client can explain why their mailing address is different from their county of residence, you must note that reason in the Notes section of the ORCA LIFT registry

# Address – County of residence

- 1. Enter the county that the client identifies they live in

Recipients Address

\*County of Residence : --Select a County-- ▾

\*Mailing Address :

Mailing Address 2 :

\*Mailing City :

\*Mailing State : Washington ▾

\*Mailing Zip :

Note: the address entered here will be verified by the  
**United States Postal Service** database of addresses.

# Address – Mailing address

## 1. Enter mailing address

Recipients Address

\*County of Residence

:

--Select a County--

\*Mailing Address

:

Mailing Address 2

:

\*Mailing City

:

\*Mailing State

:

Washington

\*Mailing Zip

:

Note: the address entered here will be verified by the  
United States Postal Service database of addresses.

# Card Serial Number

- 1. Enter the Card Serial Number

Card Information

Issued By Agency: : KCMCCS

Issued By User: : Maria Jimenez-Zepeda

\*Card Serial Number (CSN) :

8 digits

# Subsidized pass information

- 1. This will automatically default to “No”

## Subsidized Pass Information

Does recipient qualify for the : No  
subsidized LIFT program?

Qualifying Program :

# Contact preferences

1. Enter this information, if client consents to it

Note: If you will not be entering one of the fields, make sure to select “No”, otherwise you will get an error

## Contact Preferences

Voice Phone Number :

Receive Emails? : ☒ Yes ☐ No

Recipients Email Address :

Receive Text Messages? : ☒ Yes ☐ No

Cell Phone Number :

# Cardholder consent form

1. Obtain cardholder consent and check the boxes
2. Click **Submit and View Summary**

## ORCA LIFT Card Holder Consent Form

**Agency Confirmation:** As an Approved ORCA LIFT verification agent I attest to the following:

\* ☒ Confirmed client identity/and eligibility confirmed

**Customer Confirmation:**

I agree to and provided the following information:

- My first/last name and date of birth
- My mailing address
- My contact information
- My income documentation -or
- I give my express permission to access my Medicaid enrollment through Provider One, or insurance enrollment through Washington HealthPlanFinder or for DSHS to disclose my enrollment status in Basic Food.

I understand that by providing the above information I was verified as eligible for King County Metro Transit's reduced ORCA LIFT fare program, and that, except as required by law, King County may use and/or retain portions of this personal information for low income fare verification purposes ONLY.

\* ☒ ORCA LIFT client consent

\* ☒ I also understand that my low income reduced fare ORCA card is only for my use and may not be given or sold to anyone else.

☒ Yes ☐ No

I would like to be notified about other Low-income discount programs I qualify for (see contact preferences above)

**Submit and View Summary**

**Cancel**



# Review information

- 1. Review the information that you just entered to make sure it'd accurate

## Register New LIFT Card Holder

Please review the information you entered below for accuracy. To make any edits, click the Edit Registration button at the bottom to return to the form.

### New Card Holders Name

Recipient's First Name :  
Sam

Recipient's Last Name :  
Sample

Recipient's Middle Initial :

Date of Birth (DOB) :  
1/1/2000

Potential Duplicates :  
0

### Documentation Check

Low Income Qualifying :  
Document Type  
Award letter (SSI, Social Security, or Railroad Retirement)

Low Income Qualifying :  
Document Type  
DCS verified

# Review information

1. If everything looks correct, click **Submit Registration**

## Contact Preferences

Voice Phone Number :

Receive Emails? :

No

Recipients Email Address :

Receive Text Messages? :

No

Cell Phone Number :

I would like to be notified of :

other lo-income discounts

Yes

### Agency Confirmation:

Confirmed client identity/and eligibility confirmed.

### Customer Confirmation:

ORCA LIFT client consent.

I also understand that my low income reduced fare ORCA card is only for my use and may not be given or sold to anyone else.

Edit Registration

Submit Registration

Cancel

## 2. Renewing an existing ORCA LIFT client

# Search for client

1. Enter the client's first and last name
2. Enter client's Date of Birth
3. Click **Search LIFT Registry**

## Existing LIFT Card Holder Search

All searches will include results that "sound like" the word you are searching for, but may have a different spelling. Add an \* asterisk before the name to indicate any unknown letters.

\*Full or Partial First Name :  Required. Minimum 2 letters

\*Full or Partial Last Name :  Required. Minimum 2 letters

The below fields must match an existing record in order to be included in the results page. No partial matches will be returned.

Date of Birth (DOB) :  /  /  [clear selection](#)  
(if DOB is supplied, you may leave First Name blank)

5 digit Zipcode :  Optional but Requires First and Last Name if used.

Card Serial Number :  Optional. Overrides all other search filters. Exact match only.

Low Income Fare ID :  Optional. Overrides all other search filters. Exact match only.

**Search LIFT Registry**

# Search for client (cont.)

1. If the client you're looking for shows up, click on the correct entry to view and edit their information
2. Always select the entry with the most recent "Date Issued" and confirm it's the current client

## Existing LIFT Card Holder Search

LIFT Card Holders are not permitted to have a second card. Lost or stolen cards must be reported to Customer Communications & Services.

We found **5** matches.

Card Holder Name	Address	Date Of Birth	Date Issued	Date Updated	Date Renewed	CSN	LIFT ID
Konecny Mark	--Using Agency Address--	04/02/1957					16767
Mark Konecny	Homeless seattle, WA 98104	03/02/1957	01/23/2020	09/22/2021		13491053	1929
Mark Konecny	Homeless seattle, WA 98104	03/02/1957	06/05/2020	09/22/2021		13829594	1929
Mark Konecny	Homeless seattle, WA 98104	03/02/1957	09/22/2021	09/22/2021		14373501	1929
mark Konecny	201 S JACKSON ST SEATTLE, WA 98104	04/02/1957	09/03/2019	09/22/2015		14150232	19649

[Edit Search Criteria](#)[New Card Holder Registration](#)

# Verify expiration date

1. Verify that the card expiration is no more than 90 days from today
  - If expiration date is more than 90 days from today, client has to replace their ORCA LIFT card. If that's the case, contact client to let them know that they can call Metro at **206-553-3000** to request a replacement

## Card Information

Card CSN: : 14438845

Card Issue Date: : 10/8/2021 8:54:27 AM

Card Expiration Date: : 04/30/2023

Issued By Agency: : KCMCCS

Issued By User: : Maria Jimenez-Zepeda

# ORCA LIFT renewals vs replacements

- If it is not yet time for you to renew a client:
  - Contact client and let them know they can call back when it is time for them to renew (see chart on the right)
- If a client lost their card, they need to contact Metro for a replacement
  - Contact client to let them know they can contact Metro at **206-553-3000** or visit the Metro Pass Sales Office at 201 S Jackson St. Seattle, WA 98104 to request a replacement

## Card Information

Card CSN: : 14438845  
Card Issue Date: : 10/8/2021 8:54:27 AM  
**Card Expiration Date** : 04/30/2023

If this is the <u>card expiration date</u>	You can renew the client in ORCA LIFT as early as:
1/31/2022	11/2/2021
2/28/2022	11/30/2021
3/31/2022	12/31/2021
4/30/2022	1/30/2022
5/31/2022	3/2/2022
6/30/2022	4/1/2022
7/31/2022	5/2/2022
8/31/2022	6/2/2022
9/30/2022	7/2/2022
10/31/2022	8/2/2022
11/30/2022	9/1/2022
12/31/2022	10/2/2022
1/31/2023	11/2/2022
2/28/2023	11/30/2022

# Renew/Update Account

1. Scroll to the bottom of the cardholder entry
2. Click **Renew/Update Account**

## Contact Preferences

Voice Phone Number :

Receive Emails? : ☐ Yes ☒ No

Recipients Email Address :

Receive Text Messages? : ☐ Yes ☒ No

Cell Phone Number :

I would like to be notified of other lo-income discounts : ☐ Yes ☒ No

**Update Preferences**

**View Consent History**

**Return to Search Form**

**Renew/Update Account**



# Update information

1. Review Qualifying Documentation and Cardholder Address, and update if needed

## Qualifying Documentation

\*Eligibility Document Type : Award letter (SSI, Social Security, or Railroad Retirement) ▼

\*Personal Identification Type : Driver's License/State ID ▼

\*Race : Hispanic or Latino ▼

\*Primary Language : Spanish ▼

\*Household Size (1-99) : 2

Notes :

## Cardholder Address

\*County of Residence : King ▼

\*Mailing Address : 123 Azul Way

Mailing Address 2 :

\*Mailing City : Seattle

\*Mailing State : Washington ▼

\*Mailing Zipcode : 98104

Address Validated? : ☐ Valid ☒ Invalid

# Card Serial Number

- 1. Enter the new Card Serial Number
- 2. Click **Save New Card**

Card Information

Card CSN:	: 14438845
Card Issue Date:	: 10/8/2021 8:54:27 AM
Card Expiration Date:	: 04/30/2023
Issued By Agency:	: KCMCCS
Issued By User:	: Maria Jimenez-Zepeda
Date Sent to ORCA:	: 01/01/0001
Date Renewed:	: 01/01/1900

\*Card Serial Number (CSN) :

Save New Card

# Confirm changes

1. If your changes went through successfully, you'll see the following notification

## LIFT Card Holder Registration

**SUCCESS**

- Your changes have been saved.

### Card Holder Information

*First Name	: Frida
*Last Name	: Kahlo
Recipient's Middle Initial	:
*Date of Birth (DOB)	: 07/06/2007
LIFT Registration ID	: 117058
Potential Duplicates	: 1

# Cardholder consent form

1. Obtain cardholder consent and check the boxes
2. Click **Save Cardholder Information**

## ORCA LIFT Card Holder Consent

**Agency Confirmation:** As an Approved ORCA LIFT verification agent I attest to the following:

\* ☒ Confirmed client identity/and eligibility confirmed

### Customer Confirmation:

I agree to and provided the following information:

- My first/last name and date of birth
- My mailing address
- My contact information
- My income documentation -or
- I give my express permission to access my Medicaid enrollment through Provider One, or insurance enrollment through Washington HealthPlanFinder or for DSHS to disclose my enrollment status in Basic Food.

I understand that by providing the above information I was verified as eligible for King County Metro Transit's reduced ORCA LIFT fare program, and that, except as required by law, King County may use and/or retain portions of this personal information for low income fare verification purposes ONLY.

\* ☒ ORCA LIFT client consent

\* ☒ I also understand that my low income reduced fare ORCA card is only for my use and may not be given or sold to anyone else.

Validate Address Again

Save Cardholder Information

Renew Card

# Review information

1. If your changes went through successfully, you'll see the following notification

## LIFT Card Holder Registration

### SUCCESS

- Your changes have been saved.

### Card Holder Information

*First Name	: Frida
*Last Name	: Kahlo
Recipient's Middle Initial	:
*Date of Birth (DOB)	: 07/06/2007
LIFT Registration ID	: 117058
Potential Duplicates	: 1

# Contact preferences

1. Review this information
2. If you need to update the client's information, click **Update Preferences**

Note: If you will not be entering one of the fields, make sure to select "No", otherwise you will get an error

## Contact Preferences

Voice Phone Number :

Receive Emails? : ☐ Yes ☒ No

Recipients Email Address :

Receive Text Messages? : ☐ Yes ☒ No

Cell Phone Number :

I would like to be notified of other lo-income discounts : ☐ Yes ☒ No

**Update Preferences**

# Confirm changes

- 1. Click **Return to Search Form**

**Contact Preferences**

Voice Phone Number

:

Receive Emails?

:

☐Yes ☒No

Recipients Email Address

:

Receive Text Messages?

:

☐Yes ☒No

Cell Phone Number

:

I would like to be notified of other lo-income discounts

:

☐Yes ☒No

Update Preferences

View Consent History

Return to Search Form

Renew/Update Account

# Confirm changes

## 1. Click **Search LIFT Registry**


### Existing LIFT Card Holder Search

All searches will include results that "sound like" the word you are searching for, but may have a different spelling. Add an \* asterisk before the name to indicate any unknown letters.

**\*Full or Partial First Name** :  *Required. Minimum 2 letters*

**\*Full or Partial Last Name** :  *Required. Minimum 2 letters*

The below fields must match an existing record in order to be included in the results page. No partial matches will be returned.

Date of Birth (DOB) :  /  /   [clear selection](#)  
*(if DOB is supplied, you may leave First Name blank)*

5 digit Zipcode :  *Optional but Requires First and Last Name if used.*

Card Serial Number :  *Optional. Overrides all other search filters. Exact match only.*

Low Income Fare ID :  *Optional. Overrides all other search filters. Exact match only.*

**Search LIFT Registry**

**Clear Form**



# Confirm changes

1. You'll notice the new card was added successfully
2. To view that the profile was correctly updated, click anywhere in that row entry to open the cardholder entry and verify the information was correctly updated

## Existing LIFT Card Holder Search

LIFT Card Holders are not permitted to have a second card. Lost or stolen cards must be reported to Customer Communications & Services.

We found **3** matches.

Card Holder Name	Address	Date Of Birth	Date Issued	Date Updated	Date Renewed	CSN	LIFT ID
Frida Kahlo	123 Azul Way Seattle, WA 98104	07/06/2007	10/08/2021	10/08/2021		14427002	117058
Frida Kahlo	123 Azul Way Seattle, WA 98104	07/06/2007	10/08/2021	10/08/2021		14438845	117058

[Edit Search Criteria](#)[New Card Holder Registration](#)

# Lost/Stolen Cards

If a client is outside of that renewal window, clients need to replace their ORCA LIFT cards.

- To replace a regular ORCA LIFT card, clients can replace their card by calling Metro at **206-553-3000**, go online at [orcacard.com](http://orcacard.com), or visit Metro's Pass Sales Office at 201 S Jackson St, Seattle, WA 98104.
- To replace an ORCA LIFT that was loaded with a subsidized annual pass, clients **must** contact Metro at **206-477-4200** or visit Metro's Pass Sales Office at 201 S Jackson St, Seattle, WA 98104.